Tax Resolution Intake Checklist

BOULANGER CPA
Delivering the Difference
📞 OK: 405-384-4900 📞 CA: 657-218-5700
✉️ marc@boulangercpa.com
🌐 www.orangecounty.cpa | www.marcthecpa.com

Use this checklist to prepare for your tax resolution consultation. Please gather the following:

- ID and Social Security Card
- Last 2–3 years of tax returns
- IRS or FTB notices
- Pay stubs or income docs
- Bank statements
- Mortgage, rent, utility, medical, and other expense records

CALL FOR A COMPLIMENTARY TAX CONSULTATION – YOU HAVE OPTIONS!